



USAID
FROM THE AMERICAN PEOPLE

**HEALTH POLICY
INITIATIVE**

BRANDING STRATEGY AND MARKING PLAN

FEBRUARY 12, 2007

The USAID | Health Policy Initiative¹ is the project sub-brand assigned to the Policy Dialogue and Implementation indefinite quantity contract (IQC), which seeks to foster an “improved environment for health, especially family planning/reproductive health, HIV/AIDS, and maternal health.” The initiative supports policy development and implementation; capacity development of public sector and civil society policy champions; efficient and equitable resource allocation; multisectoral coordination; and evidence-based decisionmaking. The four contractors eligible to bid on task orders within this IQC are Abt Associates, Chemonics International, Constella Futures, and Research Triangle Institute (RTI).

1.0 POSITIONING

1.1 Project Name

The USAID | Health Policy Initiative name applies to all programs, projects, activities, and public communications funded by USAID through the IQC and all task orders awarded under the original contract name “Policy Dialogue and Implementation.” In all documents and materials produced by the IQC, the full name of the initiative should be used together with the task order identification number, for example, USAID | Health Policy Initiative, Task Order 1. On subsequent references, the program can be referred to as “the initiative” or “the project.” Documents will need to clearly reference the task order number under which the work was performed. Once the task order number has been referenced on the cover of the document and on first reference to the project name, it is not necessary to always repeat the task order number. However, the task order number should be mentioned as appropriate to avoid confusion with the overall IQC or other task orders.

The abbreviation “HPI” may be used in internal communications with USAID audiences or other Health Policy Initiative IQC contractors, for example, in workplans and semi-annual reports for internal distribution only.² The project name will not be abbreviated in external communications.

¹ This document was prepared by staff of the USAID | Health Policy Initiative, Task Order 1, which is funded by the U.S. Agency for International Development (USAID) under Contract No. GPO-I-01-05-00040-00, beginning September 30, 2005. Task Order 1 is implemented by Constella Futures, in collaboration with the Centre for Development and Population Activities (CEDPA), White Ribbon Alliance for Safe Motherhood (WRA), and World Conference of Religions for Peace (WCRP).

² As this is an internal document for use within USAID and by IQC contractors, the abbreviation of the project name in this document is acceptable.

I.2 Sub-brand

Working with USAID, a project sub-brand has been designed to consistently identify and unify all task orders under the IQC as the USAID | Health Policy Initiative. The sub-brand uses USAID’s recommended fonts, typefaces, colors, and sizes for sub-brands, as found in the branding guidelines created by the Agency.



Separate sub-brands will not be created for each task order. Subsequent task orders will be numbered and identified accordingly in the text of documents.

I.3 Primacy of Project Sub-brand Over Other Logos

When a product is produced under the IQC, it will typically carry the USAID | Health Policy Initiative sub-brand. In some instances, Missions may decide that it is better to position a product as coming from USAID rather than the IQC, and, in these instances, the USAID graphic identity could be used instead. Logos of contractors will not be used on materials funded under this contract, although the contractor name and contact information may be included on the inside or back covers of documents.

I.4 Translation of the Sub-brand

USAID will translate the project name “Health Policy Initiative” and the tagline “From the American People” into selected foreign languages for use when branding country-specific (not global) project activities and products in countries where the dominant language is: Arabic, Chinese, French, Hindi, Portuguese, Russian, Spanish, Vietnamese, and other languages as needed. The English sub-brand will be used for products of a global nature and in countries where a local language sub-brand has not been created. Copies of the sub-brand will be made available to staff and country programs via the project websites and possibly on CD-ROM.

2.0 TYPES OF BRANDING

There are four types of branding:

- *Full branding* – used when a product, publication, or event is positioned as from the USAID | Health Policy Initiative (includes HPI materials and HPI-funded subcontractor materials). Design follows the USAID full branding guidelines.
- *Co-branding* – used when a product, publication, or event is positioned as from the Health Policy Initiative and a partner. It applies when another organization has contributed funding and/or the Mission or CTO otherwise agrees that there is a compelling rationale to co-brand. The design varies as appropriate, though the HPI sub-brand should be of equivalent size and prominence as other partner logos. USAID approval is required for co-branding of all products produced 100

percent with USAID funds. USAID approval is not required to co-brand products produced with joint funding from other organizations, assuming the funding contributed is not a token amount.³

- *PEPFAR co-branding* – used whenever materials or activities are supported by HIV funds. The appropriate PEPFAR logo and HPI sub-brand should be of equivalent size and prominence. No USAID approval is required for PEPFAR co-branding.
- *No branding* – used when a product, publication, or event is positioned as from a host-country government or partner. Missions can also approve exemptions from branding when the objective or purpose of the product would be furthered by an appearance of neutrality; branding causes the data or findings to be viewed as not credible by target audiences; branding impairs the functionality of the product; branding would not be cost-beneficial or practical; branding of a particular product would violate a cultural or social norm or would otherwise be considered inappropriate; branding violates applicable international law; or branding would deter achievement of project goals.

Core-funded materials will follow full branding guidelines; the CTO must approve other exceptions to full branding. For materials funded with field support, the Mission must approve other exceptions to full branding requirements. The Annex contains a form that can be used for requesting an exception to full branding.

3.0 PROGRAM COMMUNICATIONS AND PUBLICITY

3.1 Audiences

The Health Policy Initiative has the following target audiences with whom it will promote and publicize USAID sponsorship:

3.1.1 Primary audience: Host-country populations including government officials, policymakers, civil society, and private sector groups that are involved in or related to the health sector (e.g., faith-based organizations, women’s groups, the media, businesses, networks and groups of people living with HIV, etc.).

3.1.2 Secondary audience: Host-country clients of family planning/reproductive health, HIV/AIDS, maternal health, and other healthcare programs and services, and other individuals who influence uptake of services; international donor agencies; other Bureau of Global Health cooperating agencies and contractors; and public health researchers.

3.2 Messages

The Health Policy Initiative differs from many other USAID-funded projects in that the focus is on providing technical assistance to improve implementation of policies, programs, and services, but does not directly fund the implementation of services per se. Therefore, external messages disseminated to the general public in the host country will be limited. Messages will typically be of a more technical nature—focusing on improving policy development and implementation—and will vary depending on the particular audiences, which are noted in Section 3.1.

³ USAID is considering determining a set percentage (e.g., at least 25 percent) as a guideline for determining when automatic co-branding would apply.

Where appropriate, the materials and communications prepared under the IQC will make clear that the product was produced with the support of the U.S. Agency for International Development under Task Order # of the USAID | Health Policy Initiative. This acknowledgment may not be appropriate in some program materials, such as certain behavior change materials, or in those instances when the materials produced must appear to be coming directly from the host-country government or local organization. The Marking Plan in Section 3.3 below lists other possible exceptions to branding requirements.

3.3 Marking Plan for Materials to be Produced

Table 1 outlines the types of materials that will be produced under the USAID | Health Policy Initiative. Any materials that are not anticipated below, but are produced under the initiative, will also be subject to branding guidelines and CTO or Mission approval, as appropriate. Please note that marking is not required on items used as part of the administration of the contract, such as stationery products, equipment, and offices. The goal is to mark programs and projects, not implementing partners. Thus, letterhead, name tags, business cards, office space, and equipment and supplies are not subject to branding.

TABLE 1. MARKING PLAN FOR MATERIALS TO BE PRODUCED

Category	Type of Marking*	Notes
ADMINISTRATIVE		
Stationery products	USAID standard graphic identity will not be used on stationery products intended for administrative use.	Pertains to letterhead, envelopes, mailing labels, fax coversheets; designs for these materials use the project name without the USAID identity.
Business cards	USAID standard graphic identity will not be used on business cards.	Please refer all inquiries about the use of the USAID identity on business cards to USAID/W.
Office signs	USAID standard graphic identity will not be used to mark project offices.	Please refer all inquiries about the use of the USAID identity on office signs to USAID/W.
Project deliverables (e.g., semi-annual reports, workplans, performance monitoring plan, financial reports, etc.)	Follows guidelines for full branding.	
IQC website and brochure	Follows guidelines for full branding.	To be developed and maintained by USAID.
Notecards	Follows guidelines for full branding.	Pertains to thank you cards, announcement cards, etc.
Folders	Follows guidelines for full branding.	
TECHNICAL		

TABLE 1. MARKING PLAN FOR MATERIALS TO BE PRODUCED

Category	Type of Marking*	Notes
Technical website	HPI sub-brand presented at the top the homepage and sub-pages as appropriate; design follows guidelines for full branding .	To be developed and maintained by the Task Order I contract holder; it will serve all task orders (Note: USAID will develop and maintain the HPI IQC site).
Technical reports, studies, and analyses	HPI sub-brand printed on the cover of documents; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	
Briefing papers, memoranda, and policy recommendations	HPI sub-brand printed on the cover of documents; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	
Government policies, strategies, plans, and guidelines (<i>regional, national, and subnational levels</i>) or other materials positioned as being from the host-country government	These materials would be exempted from marking under presumptive exception (iii): USAID branding would undermine host-country government ownership of constitutions, laws, regulations, policies, studies, assessments, reports, publications, surveys or audits, public service announcements, or other communications better positioned as “by” or “from” a cooperating country ministry, agency, department, or government official.	It may still be possible to acknowledge USAID assistance in the document.**
Organizations’ policies, strategies, plans, and guidelines (e.g., <i>a church’s HIV action plan, a workplace anti-discrimination policy</i>) or other materials positioned as being from the host-country partner	These materials would be exempted from marking under presumptive exception (iii): USAID branding would compromise the organization’s ownership of constitutions, laws, regulations, policies, studies, assessments, reports, publications, surveys or audits, public service announcements, or other communications better positioned as “by” or “from” a host-country partner organization. Another rationale for this exception is because we are trying to build capacity of the local organization (viii, program goal of capacity building) and branding would compromise ownership of said materials. Other materials may be eligible for an	It may still be possible to acknowledge USAID assistance in the document.**

TABLE 1. MARKING PLAN FOR MATERIALS TO BE PRODUCED

Category	Type of Marking*	Notes
	exception from marking on a case-by-case basis with approval from USAID, when the materials are better positioned as from the local organization in order to increase the credibility of the materials in the eyes of local audiences (ii).	
Training materials and manuals	HPI sub-brand printed on the cover of documents; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	
Software	HPI sub-brand incorporated into the splash screen/menu and printed on the software packaging; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	
CD-ROMs	HPI sub-brand printed on the CD label, splash screen/menu, and packaging; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	
PowerPoint presentations	HPI sub-brand is required on title and breaker slides; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	Subject to Mission approval, design of the PowerPoint may be tailored to the specific audience at the country level as long as title slides use USAID branding.
Conference posters and presentations	HPI sub-brand printed on the poster or presentation; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	Posters and materials presented at professional meetings or international conferences that use HPI data or research should use the HPI sub-brand. Co-branding with the author's organization may be requested if the corporate office made significant contributions to the technical and intellectual development of the study and the resulting products. The author's corporate affiliation could also be acknowledged in the author block.

TABLE 1. MARKING PLAN FOR MATERIALS TO BE PRODUCED

Category	Type of Marking*	Notes
Flyers and factsheets	HPI sub-brand printed on the materials; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	
Videos	HPI sub-brand included in opening and/or closing title sequences, as appropriate; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding	
Program materials (communications that target beneficiaries with particular messages, e.g., “Prepare a will,” “Know your rights”)	HPI sub-brand or other acknowledgment of USAID printed on the materials, if and as appropriate as per Mission approval.**	If used, the preferred placement of the HPI sub-brand is on the front cover or poster in the lower left-hand corner.
PROMOTIONAL		
Event signs, banners, and exhibition booths	HPI sub-brand printed on the materials; design follows guidelines for full branding unless co-branding is acceptable or an exemption is provided for no branding.	
Project promotional materials (e.g., success stories, beneficiary testimonials, announcement of research findings or project results)	HPI sub-brand printed on the materials; design follows guidelines for full branding.	
Materials for policy launch events	HPI sub-brand or other acknowledgment of USAID assistance printed on the materials, if appropriate as per Mission approval.**	Materials would follow same branding strategy as for actual policy document; see above.
Materials for site visits	HPI sub-brand printed on the materials; design follows full branding guidelines.	

Notes:

* Exact positioning of the HPI sub-brand or other USAID acknowledgment may vary if the product, with CTO and/or Mission approval, is subject to co-branding or no branding.

** Even when a document qualifies for “no branding,” it may be possible to acknowledge USAID’s contribution in one of several ways:

- The USAID standard graphic identity or the HPI sub-brand may appear on the inside cover with the following acknowledgment: “This document was produced with support from the U.S. Agency for International Development through Task Order 1 of the USAID | Health Policy Initiative under Contract No. GPO-I-01-05-00040-00.” Wording may vary slightly depending on the product and the nature and extent of the technical assistance provided. This acknowledgment should also be modified as appropriate to correspond to the particular task order and contractors.
- USAID support may be acknowledged in the preface, foreword, or acknowledgment sections of the document.

3.4 Promotional Activities/Materials for Host-country Citizens

Because the level of desired visibility for the USAID | Health Policy Initiative is low given the nature of the project's activities (e.g., behind-the-scenes technical assistance) and results (e.g., increased leadership capacity or an operational policy change vs. building a school, establishing a clinic, providing food aid, or repairing a road), the opportunities for and appropriateness of widespread in-country publicity and external promotion of the Health Policy Initiative sub-brand and the support of the American people is somewhat limited. In-country awareness of the support of the American people will be generated primarily through the following key opportunities:

- Project activities (e.g., acknowledgment at training workshops)
- Success stories (disseminated through the Health Policy Initiative website(s), USAID listservs, and e-newsletters, etc.) – 4/year
- Beneficiary testimonials – 1/year
- Site visits by USAID and U.S. Government officials
- Professional photography of key visits by top U.S. Government officials, training workshops, etc.
- Conference presentations, posters, and exhibition booths
- Launch events, when and where appropriate
- Announcements of research findings or release of a new study
- Promotion of final or interim reports
- Communication of program impact/overall results

It is USAID's policy that contractors must not generate their own corporate publicity about a USAID-funded program without first obtaining permission from the Agency. USAID should also be notified before contractors make public the findings of USAID-funded studies or reports (e.g., at conferences, public meetings).

4.0 ACKNOWLEDGMENTS

4.1 Acknowledging USAID and the Health Policy Initiative IQC Funding Mechanism

The following acknowledgment will be included on external Health Policy Initiative publications and internal publications, such as semi-annual reports, as appropriate. The examples below use information for Task Order 1, however, the task order number, contract number, start date, and contractor and subcontractor names will vary as appropriate.

4.1.1 *Non-HIV-funded publications:*

The USAID | Health Policy Initiative, Task Order 1, is funded by the U.S. Agency for International Development under Contract No. GPO-I-01-05-00040-00, beginning September 30, 2005. Task Order 1 is implemented by Constella Futures, in collaboration with the Centre for Development and Population Activities (CEDPA), White Ribbon Alliance for Safe Motherhood (WRA), and World Conference of Religions for Peace (WCRP).

4.1.2 *HIV-funded publications:*

HIV-funded products can be linked to the President's Emergency Plan for AIDS Relief (PEPFAR) by including an additional sentence in the acknowledgment, which can also be modified as needed to indicate other program or initiative funding.

The USAID | Health Policy Initiative, Task Order 1, is funded by the U.S. Agency for International Development under Contract No. GPO-I-01-05-00040-00, beginning September 30, 2005. **HIV-related activities of the initiative are supported by the President's Emergency Plan for AIDS Relief.** Task Order 1 is implemented by Constella Futures, in collaboration with the Centre for Development and Population Activities (CEDPA), White Ribbon Alliance for Safe Motherhood (WRA), and World Conference of Religions for Peace (WCRP).

4.2 Acknowledging Host-country Governments

As the Health Policy Initiative strives, in part, to improve national health policies and at the same time, build local capacity and ownership, host-country ministries will be key partners of the initiative. Because a significant proportion of funding for the Health Policy Initiative is expected to come from field missions, USAID does not pre-designate priority countries for this contract. Based on past experience, the contractors under the Health Policy Initiative IQC can expect to work in approximately 30 countries. Policies, strategies, plans, and guidelines that are to be positioned as coming from host-country governments are exempted from full branding requirements (see Sections 2.0 and 3.3).

4.3 Acknowledging Other Host-country Partners

As the Health Policy Initiative strives, in part, to build capacity of civil society policy champions and improve multisectoral coordination and implementation of policies and programs, civil society and private sector groups will be key partners of the initiative. Especially when working with in-country partners and grassroots organizations, recognizing contributions of partners is essential for building local capacity, increasing in-country ownership and validation of project activities or findings, and highlighting the ways in which the U.S. Government works collaboratively with others. Because a significant proportion of funding for the Health Policy Initiative is expected to come from field missions, USAID does not pre-designate priority countries or partners for this contract. Based on past experience, the contractors under the Health Policy Initiative IQC can expect to work with groups in approximately 30 countries. Co-branding with civil society and private sector groups products will occur when these organizations have contributed funds to the activity. Co-branding with in-country partners may also be desirable when trying to promote local ownership and capacity building. Policies, strategies, plans, and guidelines that are to be positioned solely as coming from in-country organizations (such as NGOs, faith-based groups, and businesses) are exempted from full branding requirements (see Sections 2.0 and 3.3). In all other cases, USAID approval is required for exceptions to full branding requirements.

4.4 Co-Branding with Other Donor Organizations

Based on previous experience, the contractors under the Health Policy Initiative can expect to collaborate with other donor organizations, such as GFATM, GTZ, UNAIDS, UNDP, UNICEF, U.S. Department of Labor, WHO, and other organizations that contribute funds to publications, products, and events. In such cases, the guidelines for co-branding will be followed, assuming the funding contributed is more than a token amount. Otherwise, USAID approval will be required for co-branding.

4.5 Co-branding with the President’s Emergency Plan for AIDS Relief

The Health Policy Initiative receives funding from the offices of Population and Reproductive Health (PRH), HIV/AIDS (OHA), and HIDN, regional bureaus, and missions. For its HIV-related products, publications, and events, the Health Policy Initiative will follow the branding guidelines established by the Office of the Global AIDS Coordinator (OGAC) pertaining to PEPFAR. While final guidelines have not been released, OGAC encourages projects receiving HIV funds to co-brand PEPFAR whenever USAID is also identified. Co-branding means that the PEPFAR logo should be of equal size and prominence as the USAID | Health Policy Initiative sub-brand and that PEPFAR should be acknowledged in any text along with USAID (see Section 4.1.2 above). These guidelines may be subject to change once the final OGAC branding guidelines are released.

OGAC has created country-specific logos for the 15 focus countries and the “plus five” countries. These logos feature the country flags and should be used for any country-specific materials. The general PEPFAR logo, without flags, should be used in all other countries and for materials that are intended for international audiences. Note: When a country-specific PEPFAR logo is used, the USAID | Health Policy Initiative sub-brand remains the same (Mission sub-brands are not used).

FORM FOR REQUESTING EXCEPTIONS TO FULL BRANDING

Please use the attached form to facilitate the process of seeking and tracking Mission and CTO approval for any exceptions to full USAID branding of HPI materials. This form is available for downloading via the project websites. Email approvals are also acceptable.

Approval is not needed for full branding. Approval is also not required for co-branding when other organizations contribute funds for the document's production, but it is needed when USAID paid for the activity or product in its entirety. The CTO or Mission may also approve co-branding for the following reasons:

1. Co-branding acknowledges the human resources or in-kind resources contributed by the partner;
2. Co-branding builds capacity of a local organization, such as a women's group or network of people living with HIV;
3. A document deals with culturally sensitive issues (e.g., adolescent reproductive health, gender norms, HIV prevention for youth, etc.) and co-branding highlights the broad-based local support for the findings of the report; or
4. Other reasons as appropriate.

Policies, strategies, and guidelines to be positioned as from a host-country government or host-country partners are exempt from full branding, as specified in Section 3.3, Table 1. The CTO or Mission may also approve no branding when branding would:

1. Compromise the intrinsic independence or neutrality of a program or materials where independence or neutrality is an inherent aspect of the program and materials. This includes, but is not limited to, the following: election monitoring or ballots, and voter information literature; political party support or public policy advocacy or reform; independent media, such as television and radio broadcasts, and newspaper articles and editorials; and PSAs or public opinion polls and surveys.
2. Diminish the credibility of audits, reports, analyses, studies, or policy recommendations whose data or findings must be seen as independent.
3. Undercut host-country government "ownership" of constitutions, laws, regulations, policies, studies, assessments, reports, publications, surveys or audits, PSAs, or other communications better positioned as "by" or "from" a cooperating country ministry, organization, or government official.
4. Impair the functionality of an item, such as sterilized equipment or spare parts.
5. Incur substantial costs or be impractical, such as items too small or otherwise unsuited for individual marking, such as food in bulk.
6. Offend local cultural or social norms, or be considered inappropriate on such items as condoms, toilets, bed pans, or similar commodities.
7. Conflict with international law, such as the international recognized neutrality of the International Red Cross (IRC) or other organizations.
8. Deter achievement of program goals, such as cooperating with other donors or ensuring repayment of loans.

Even in cases of no branding when the HPI sub-brand is not used, USAID's contribution may be acknowledged either in the text or verbally at relevant meetings and events.

Program materials do not need to follow the full branding guidelines for type, color, and layout. However, the project sub-brand or other acknowledgment statement should be used on program materials to acknowledge the U.S. Government's support and funding, if and when appropriate. CTO/TA or Mission approval, depending on the funding source, should be obtained before program materials are produced.

Note: All documents and materials produced for widespread distribution (irrespective of the type of branding) should be reviewed and cleared by USAID prior to production.



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REQUEST FOR EXCEPTIONS TO FULL BRANDING

1. Title (or Activity):

If not known yet, please briefly describe the material to be marked

2. Type of material(s) to be produced (document, banner, CD, program materials, etc.):

3. Type of branding proposed:

- ☐ Co-branding with another donor
- ☐ Co-branding with local partner
- ☐ Exemption from branding ("no branding")

4. Date Submitted:

5. Date Approval is Needed By:

6. If not using full branding, please describe the proposed branding approach (attach example if available):

7. Rationale for branding approach:

8. Type and placement of USAID acknowledgment if appropriate:

FOR CTO or MISSION USE ONLY

- ☐ I approve of the proposed branding approach.
- ☐ I approve of the proposed branding approach, with the following changes:

- ☐ I do not approve of the proposed branding approach. Please submit a new proposal.

Name

Title

Date